

PORTUS DEVELOPMENTS RELEASE 10.0 UPDATE



The Portus development team are pleased to announce that the latest release of the Platform portal went live on Friday 29th May 2015. Our focus was based primarily on your feedback. A number of new features are included as part of this release, including: the newly revised 15 question 'Attitude to Risk' questionnaire by eValue, enhancements to the Portfolio Rebalance builder and to the client report.

1. New 15 Question 'Attitude to Risk' questionnaire:

A new and improved Attitude to Risk questionnaire developed by eValue. The original questionnaire has been updated and improved to be more consistent with both UK and Irish markets.

In summary, the questionnaire has been deemed by eValue to be appropriate for the Irish Market. They have been careful to remove any questions where answers have potential to vary by region/country.

The questionnaire has moved out to 15 questions from 11 and now includes 8 completely new questions, whilst retaining 7 questions from the original questionnaire.

Portus will also now display details of who had last updated the questionnaire and when.

2. Revamped Portfolio Rebalance:

Based on your feedback we have revised and revamped the Portfolio Rebalance builder. Including new features and screen enhancements such as:

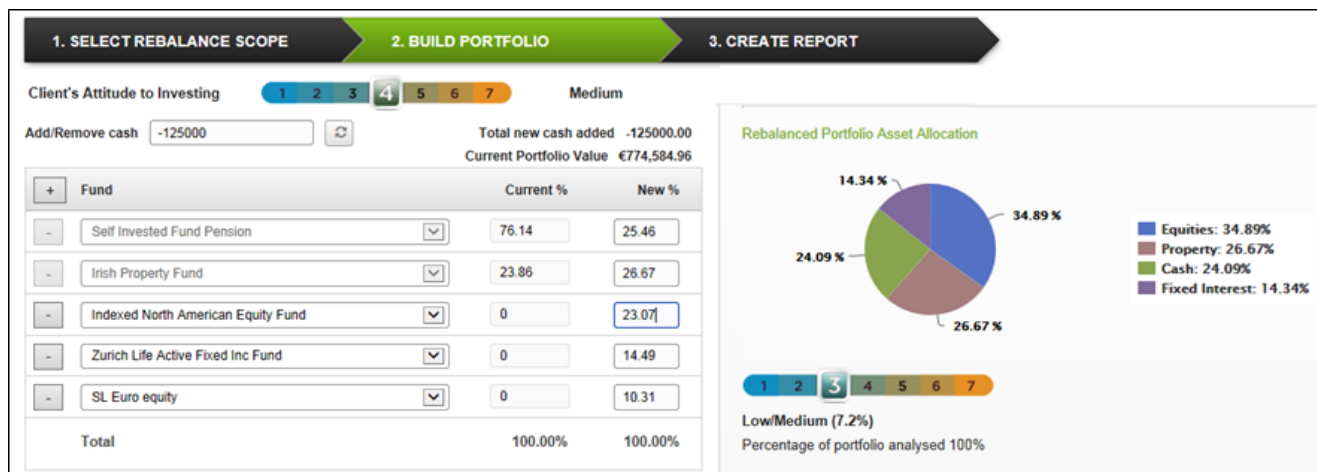
- A new screen to allow users the option to choose which plans/assets are to be included in the Portfolio Rebalance

- New functionality to include any withdrawals in the u 7 #

1. SELECT REBALANCE SCOPE			2. BUILD PORTFOLIO	3. CREATE REPORT
Plans				
Plan ID	Type	Description		
<input checked="" type="checkbox"/> 11777402	Pension	AMRF		
<input checked="" type="checkbox"/> 11777542	Pension	ARF		
Additional Assets				
Asset ID	Type	Description		
<input checked="" type="checkbox"/> 15670	Specify fund(s) (Regular premium)	KBC 12 Month		
<input checked="" type="checkbox"/> 14402	Specify fund(s) (Single premium)	Aviva Bond		
<input checked="" type="checkbox"/> 13182	Specify fund(s) (Regular premium)	PTSB 12mth int 1st		
<input checked="" type="checkbox"/> 14541	Specify fund(s) (Single premium)	KBC Sec Inc +9		
<input checked="" type="checkbox"/> 13362	Specify fund(s) (Single premium)	Friends First INV		

- The Rebalance report format has been updated, with more explanations and clearer presentation of required fund movements.

(Revamped Portfolio Rebalance - Contd):



3. Enhancements Based on your Feedback:

- New monthly refresh of risk rating of all funds displayed in the 'Platform' and 'Invested' funds tab.
- Additional client detail included in Business Summary Client Export - Client postal address, email address and phone number.
- In the Portfolio Return Calculation inward Cash flows for investment products will display as the Gross amount received instead of Net of Govt. 1% Levy.
- The Additional Asset display list will now include a reference number relating to each additional asset.

As always your feedback is really important to us to ensure we continue to develop a platform that makes it easier for you to do business. In addition to these main changes, the release has a host of smaller fixes and functional enhancements. A full list of all of these changes is available in the news section.

If you require any further information, or have any comments or feedback on this release or if you would like any additional training on any of these new features please contact Donal Wood, Head of Platform Development & Deployment or Niall Cooke, Platform Business Development Manager.



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